

# REQUEST FOR PROPOSAL

## Addendum # 1



Department Of Executive Services  
Finance and Business Operations Division  
**Procurement and Contract Services Section**  
206-684-1681 TTY RELAY: 711

**DATE ISSUED: July 6, 2006**

RFP Title: **Microsoft CRM Implementation for Constituent Management**  
Requesting Dept./ Div.: **King County Department of Natural Resources & Parks**  
RFP Number: **136-06CMB**  
Due Date: **July 13, 2006 - 2:00 P.M.**  
Buyer: **Cathy M. Betts, [cathy.betts@metrokc.gov](mailto:cathy.betts@metrokc.gov) (206) 263-4267**

This addendum is issued to revise the original Request for Proposal, dated June 22, 2006 as follows:

1. The proposal opening date remains the same: Thursday, July 13, 2006 no later than 2:00 p.m. exactly.

**The following information is provided in response to questions received:**

Q1: Can offshore outsourcing vendors with local US office submit a response to this RFP.

*A1: Yes, we will accept proposals from all vendors.*

Q2: Do you expect the CRM user base to grow beyond the Department of Natural Resources & Parks?

*A2: We expect the first growth beyond the initial CRM implementation will probably be to add the CRM customer service module and 3<sup>rd</sup> party web portal. It is anticipated this would happen about 12 months after the initial implementation of CRM.*

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### TO BE ELIGIBLE FOR AWARD OF A CONTRACT, THIS ADDEMDUM MUST BE SIGNED AND SUBMITTED TO KING COUNTY

**Sealed proposals will only be received by:**

**King County Procurement Services Section, Exchange Building, 8<sup>th</sup> floor, 821 Second Avenue, Seattle, WA 98104-1598. Office hours: 8:00 a.m. - 5:00 p.m., Monday - Friday**

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Company Name

Address		City / State / Postal Code
Signature	Authorized Representative/Title	
Email	Phone	Fax

This Request for Proposal – Addendum will be provided in alternative formats such as Braille, large print, audiocassette or computer disk for individuals with disabilities upon request.

Q3: If so, when do you expect this growth to occur, 3, 6, 9 or 12 months?

A3: *It is anticipated that the CRM user base will grow beyond the Department of Natural Resources and Parks (DNRP). Other County agencies are waiting for DNRP to prove the concept, so it is anticipated that this growth will probably not occur until 12-24 months after the initial implementation of CRM. This current procurement does not take into consideration any additional usage by other County Agencies based on each Agencies particular needs.*

Q4: Is the budget set at 40K. If our estimate is above 40K, will we be disqualified?

A4: *The cost shown in the RFP was only an estimate. Proposals will not be disqualified based solely upon their price estimate. We are seeking the solution provider best equipped to work with our department staff to define our CRM solution requirements, deliver a CRM implementation based upon our requirements, and transfer knowledge to department IT staff so we are able to administer and updates the CRM system in the future.*

Q5: In Section I, Sub-section I, this part of the RFP states that, for the selected consulting partner, “a contract with fixed price/prices will be negotiated”. For clarification, should this be interpreted such that the resulting contract for the project will include the absolute and final cost to DNRP for the engagement? We have found in our experience that there are several areas of a CRM engagement that are difficult to structure on a fixed-fee basis – report development and data migration are two of the most challenging areas, as the required scope can not always be accurately determined prior to starting the project. How would DNRP prefer for RFP responders to accommodate for these areas in the RFP response, if in fact it will need to be a fixed-fee contract? We would be happy to offer several approaches that we have used in the past with success.

A5: *Responders are welcome to offer whatever approaches they have found successful in the past. However, we must be able to evaluate your pricing proposal against the other responders.*

Q6: In Section II, Part 1, the RFP includes as one of the project objectives “install c360 CRM add-on software”. Could you provide additional detail? c360 offers a variety of add-on products for the Microsoft CRM, with various degrees of effort associated with installation and configuration.

A6: *We purchased the c360 Core Productivity Pack (includes Dashboard, Search Pac, Activity Summary, and Email Link) for our CRM 1.2 installation. We will want to install their upgrades as part of this RFP.*

Q7: Regarding Section II, Part 1, the RFP lists as an objective for the consulting engagement, “development of insightful reports for the DNRP management team”. Have these reports already been defined at any level of detail, or is the design of these reports planned to be completed as part of this engagement?

A7: *Report design is to be completed as part of this RFP.*

Q8: Regarding Section II, Part 2, Sub-section A, in describing the data migration required for the project, two sources are mentioned: 1) a Microsoft SQL Server 2000 database containing approximately 30,000 records and 2) a Microsoft Exchange Server Listserv with approximately 10,000 records. Could you provide additional details about these data sources? Specifically:

- a. What type of data are the 30,000 records in the SQL Server? To which CRM entity or entities (e.g. Accounts, Contacts, Activities) will this data need to be migrated?

A8a: *Data would be migrated to accounts or contacts, the structure of the SQL Server Data is:  
Last Name First Name Sub-Title Organization Street, City, State, Zip Account.*

- b. Our assumption about the Listserv data is that it includes individual information (name, address, telephone number, etc.) and email addresses, and that each record in this source will be converted into a single CRM Contact as part of the data migration. Is this accurate?

A8b: *Correct*

c. Is the data free of duplicates, or will duplicates need to be purged as part of the data migration?

*A8c: We anticipate that duplicates will need to be purged as part of the data migration.*

Q9: In Section II, Part 1 and Section II, Part 2, Sub-section B, Part I outlines a number of goals/desires that resemble outbound marketing activities such as building segmented lists of constituents and managing large scale communications. Section II, Part 2, Sub-section B of the RFP seems to outline the areas of CRM that will be configured as part of the project – Accounts, Contacts, and Activities. While it is possible to do some basic marketing-type activities using just these entities, you are likely aware that Microsoft CRM 3.0 also includes new entities specifically designed to provide richer functionality in this area – the Marketing List, Marketing Campaign, and Quick Campaign. Has DNRP examined this new functionality of CRM 3.0 and concluded that these marketing-specific entities will not be needed for the project, or is there the potential that these areas of the system will need to be discussed and configured as well as the Accounts, Contacts, and Activities stated in the RFP?

*A9: DNRP has not examined the new CRM 3.0 entities. There is a potential that these areas of the system will need to be discussed and may need to be configured.*

Q10: In Section II, Part 2, Sub-section B, could you explain how you define a “train-the-trainer” training approach? In our experience this involves providing intense CRM training to a very small set of individuals (usually one or two), with the intention of preparing them to conduct subsequent training sessions for the remainder of the users themselves. This approach can provide cost savings for the client by allowing them to minimize the time required from their consulting partner to complete training for large groups of users.

*A10: Your definition of the “train the trainer” above matches our desired approach. We are also looking for knowledge transfer from our consultant so that DNRP staff can successfully administer and make modifications o the CRM system in the future.*

Q11: In Section II, Part 2, Sub-section C., this is a great project timeline, and one that lines up well with how we are accustomed to delivering CRM engagements. However, based on our experience, there may be an opportunity to accelerate the project with some minor adjustments to the timeline. Would DNRP be open to discussing potential adjustments with the selected consulting partner during the initial planning meetings?

*A11: DNRP is open to discussing potential adjustments to this cope of work and timeline with the selected consulting partner.*